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Salesforce Financial Services Cloud Accredited Professional Sample Questions (Q61-Q66):

NEW QUESTION # 61

Lake Tahoe Bank branch manager is asking the Salesforce Administrator for improvements in Salesforce to speed up Loan Approval Processing. The Salesforce Admin is considering using Action Plans. Which 3 process improvements can be delivered using Action Plans?

- A. Action Plans can speed up the collection of a list of documents needed for the loan application
- B. Action Plans create repeatable tasks and automate the task sequences when executed
- C. When you create an action plan from a template for a specific target record, items that have no assigned user are assigned to the owner of that "target record."

- D. Action Plans enhance collaboration and productivity by automatically assigning task owners and deadlines for specific client processes.
- E. Action Plans can automatically schedule the next appointment with the Advisor.

Answer: B,C,D

Explanation:

Action Plans are a feature that allows users to create templates for common client processes, such as loan approval, account opening, or financial review. Action Plans can create repeatable tasks and automate the task sequences when executed. When an action plan is created from a template for a specific target record, such as an account or an opportunity, items that have no assigned user are assigned to the owner of that target record.

Action Plans can also enhance collaboration and productivity by automatically assigning task owners and deadlines for specific client processes.

NEW QUESTION # 62

How are identification documents, other assets, liabilities, goals, and revenue modeled, in an existing Financial Services Cloud org using the individual account model?

- A. Document, Note, and Attachment objects are used to represent other assets, liabilities, and goals. In the individual model, these objects are related to the person account.
- B. Custom objects are used to represent other assets, liabilities, and goals. In the individual model, these objects are related to the Account object.
- C. An administrator is logged in to Data Loader with their own credentials to insert new Business Account records into their Salesforce environment. They forgot to specify the Account Owner field in the import file.
- D. Assuming there are no other issues, what should happen when the administrator uploads the import file?
The Attachment object is used to represent other assets, liabilities, and goals. In the individual model, these attachments are related to the Account object.

Answer: D

Explanation:

In an existing Financial Services Cloud org using the individual account model, custom objects are used to represent other assets, liabilities, and goals. These objects are related to the Account object via lookup relationships. For example:

The Other Asset object is used to represent non-financial assets owned by an account holder, such as real estate properties, vehicles, or jewelry.

The Other Liability object is used to represent non-financial liabilities owed by an account holder, such as mortgages, loans, or taxes.

The Financial Goal object is used to represent financial objectives pursued by an account holder, such as retirement planning, education funding, or debt reduction. Verified References:

- 1: Salesforce Help Article [10]
- 2: Salesforce Help Article [11]
- 3: Salesforce Help Article [12]

NEW QUESTION # 63

The Salesforce Administrator at Lake Tahoe Bank is asked to make modifications to the Salesforce org to allow for more than one person being joint owners on a Financial Account. What will be the recommended approach to model this requirement?

- A. Map the primary owner and one joint owner to the Financial Account, because FSC, supports only two joint account owners.
- B. Map additional owners using the Financial Account Role.
- C. Create lookup fields on the Financial Account object to support additional owners
- D. Map additional owners using the Actionable Relationship Center.

Answer: B

Explanation:

To model a requirement where more than one person can be joint owners on a Financial Account, the Admin can map additional owners using the Financial Account Role. The Financial Account Role is a junction object that links a contact or an individual to a financial account and defines their role or relationship with that account. By using Financial Account Role, the Admin can add multiple owners to a Financial Account and specify their ownership percentage, primary status, and other details.

NEW QUESTION # 64

Which three record type options should an advisor configure for a Lead object configuration?

- A. Adjustments
- B. Retirement Planning
- C. Opportunity
- D. Referral
- E. General

Answer: B,D,E

Explanation:

Reference: Financial Services Cloud - Account and Contact Record Types | Salesforce Help Explanation: Record types are a way to categorize records in Salesforce based on different business processes or requirements. Record types can have different page layouts, picklist values, and business logic. For the Lead object, a financial services company can create different record types to capture different types of leads based on their source, interest, or qualification. Some examples of record types for the Lead object are:

Referral: This record type can be used to capture leads that are referred by existing clients or partners.

Referral leads can have fields such as Referrer Name, Referrer Account, and Referral Type to track the source and nature of the referral.

General: This record type can be used to capture leads that are generated from general marketing campaigns or events. General leads can have fields such as Campaign Name, Campaign Source, and Lead Score to track the effectiveness and potential of the marketing efforts.

Retirement Planning: This record type can be used to capture leads that are interested in retirement planning services or products. Retirement planning leads can have fields such as Retirement Age, Retirement Goal, and Current Savings to assess the needs and suitability of the leads.

NEW QUESTION # 65

How can the Salesforce Admin change the configuration to summarize Financial Goals at the household level?

- A. Update the selection in "Activities & Objects to Roll Up" to include Financial Goals
- B. Add a custom Rollup By Lookup (RBL) rule.
- C. Create a formula field and add it to the Account page layout
- D. Financial Goals can not be summarized at the household level.

Answer: A

Explanation:

To change the configuration to summarize Financial Goals at the household level, you need to update the selection in "Activities & Objects to Roll Up" to include Financial Goals. This option is available in Setup > Financial Services Settings > Activities & Objects to Roll Up. By selecting Financial Goals, you enable Group-Level Rollups for Financial Goals, which display the total number of goals, completed goals, and completion percentage of all the goals that belong to a group. Verified References: : Salesforce Financial Services Cloud Implementation Guide, page 81.

NEW QUESTION # 66

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